



Tax Technician, Franchise Tax Board

Agency Code: 7299 Class Code: 7505 Exam Code: 8PB44

Department(s):	Franchise Tax Board
Opening Date:	1/13/2010 8:00:00 AM
Final Filing Date:	Continuous
Type of Examination:	Departmental Open
Salary:	MONTHLY-RANGED-SALARY - \$2,495.00 to \$3,426.00
Tenure/Time-base:	Permanent Full-time Permanent Part-time Permanent Intermittent Limited Term Full-time Limited Term Part-Time Limited Term Intermittent
Exam Type:	State-wide

EEO

An equal opportunity employer to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, or sexual orientation.

DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

WHO SHOULD APPLY?

Candidates who meet the minimum qualifications as stated below may apply for this examination at any time. Once you have taken the examination, you may not reapply for nine (9) months. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

FILING INSTRUCTIONS

Final File Date: Continuous

Where to Apply: Click on the Exam link at the bottom of this bulletin.

SPECIAL TESTING ARRANGEMENTS

If you have disability and need special testing arrangements, call the State Personnel Board's Examination and Selection Services Section at (866) 844-8671, Telecommunications Device for the Deaf (TTY) (916) 654-6336, or via California Relay (Telephone) Service for the deaf or hearing impaired: from TTY phones: 1-(800) 735-2922.

SALARY INFORMATION

Range A: \$2495 - \$3034

Range B: \$2817 - \$3426

Range A - This range will apply to individuals who do not meet the criteria for Range B.

Range B - This range will apply to individuals who have either: 1) satisfactorily completed 6 months of experience as a Tax Technician, FTB, Range A and at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law; or 2) one year of experience performing duties at a level of responsibility equivalent to Tax Program Technician I (Taxpayer Services); or 3) the equivalent to graduation from college (four-year degree), which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law.

Current salary levels and placement/movement in the appropriate salary range(s) should be confirmed with the hiring department upon receiving a job offer. The salaries used in this bulletin are the latest available from the State Controller's Office, but may not reflect the most recent salary adjustment.

Bilingual positions exist for candidates fluent in Spanish. Candidates who are certified and appointed to a bilingual Tax Technician position shall receive an additional \$100.00 a month.

EMPLOYMENT LIST INFORMATION

An open eligible list will be established for the Franchise Tax Board. Names of successful candidates will be merged on the eligible list in order of final scores regardless of test date.

Eligibility expires 12 months after it is established.

MINIMUM QUALIFICATIONS

EITHER I

Experience: One year of experience in the California state service performing duties at a level of responsibility equivalent to that of a Tax Program Assistant, Range C.

OR II

Education: Sixty semester or ninety quarter units of college which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law (persons who will complete the course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment).

OR III

Experience: Three years of increasingly responsible experience in a financial, commercial, or governmental establishment, at least one year of which shall include one or a combination of activities involving the (1) marketing, distribution, and sale of merchandise; (2) approval of loans; (3) collection on delinquent accounts; or (4) contact of client-customer services which involves the explanation of policies, regulations, or procedures for a public agency or private institution such as a bank, insurance company, credit bureau, or title company.

POSITION DESCRIPTION

A Tax Technician, FTB, under general supervision, performs paraprofessional tasks of tax and non-tax law, regulation and policy enforcement. **Collection Program:** analyzes, determines appropriate action and initiates various courses of action on collection accounts; communicates with taxpayers to resolve collection problems; prepares bankruptcy or probate claims responding to contacts that may be adversary in nature and follows up to assure final resolution. For special procedures, prepares, adjusts and amends or withdraws bankruptcy or probate claims and responds to verbal and written correspondence regarding objectives to and rejection of bankruptcy claims. **Call Center or Public Counter functions in Collections, Audit and Filing Programs:** communicate with taxpayers via incoming phone calls or in person; advises, assists and explains various provisions of laws and regulations administered by the department and in the preparation of individual and corporate tax returns and property tax assistance claims; resolve collection notice problems; handle liability disputes; initiate transactions to correct account errors and modify or release accounts; explain the basis for the liabilities; identify, analyze and release liens; analyze financial statements and recommend payment arrangements; issue assessments for missing years and recommend discharge from accountability. In an **Audit** setting: performs desk audits and prepares adjustment notices based on audit findings; communicates with tax payers to resolve issues developed by the audit; takes appropriate action on protests of adjustment notices and provides technical assistance to other technicians and clerical support staff. In a **Program Support** area: performs equivalent paraprofessional, staff or administrative specialties in support of the department's programs. This includes completion of less complex research, analysis, modification and implementation of various legislative proposals, operational changes, forms and quality maintenance procedures and systems used to support and maintain the department's audit and compliance programs.

Positions exist statewide and out of state (including Chicago IL, Houston TX, and Manhattan NY).

EXAMINATION INFORMATION

Interviews will not be held. This examination will consist of a Training and Experience Evaluation weighted 100%. Candidates who do not meet the minimum qualifications will not be placed on the resulting eligible list. In order to obtain a position on the eligible list, a minimum rating of 70% must be attained.

[Click here to preview the Training and Experience Evaluation](#)

KNOWLEDGE AND ABILITIES

Knowledge of:

1. Provisions of the rules, regulations, organizations, and procedures of the Franchise Tax Board.
2. In one or more program areas and applicable tax or non-tax laws.
3. One or more of the functions, applications or processes administered and performed by the Franchise Tax Board.
4. Business and financial practices.
5. Current office methods, technologies, and equipment.
6. Mathematics, spelling, grammar, punctuation, and modern English usage.

Ability to:

1. Interpret, apply, and/or explain provisions of governmental, tax or non-tax rules, regulations, and departmental procedures and policies.
2. Learn rapidly and follow directions.
3. Communicate effectively and tactfully with other staff and with the public in person or over the telephone, including situations involving difficult, disagreeable, and adversarial contacts.
4. Analyze and interpret written and numerical data accurately and adopt an effective course of action.
5. Evaluate situations quickly and accurately, and take effective action.
6. Learn to utilize personal computer systems and software applications in the performance of work.
7. Accurately and quickly enter data into a computerized database.
8. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer these to appropriate sources.
9. Write effectively.

VETERANS PREFERENCE

Veterans' Preference credits will be added to the final score of all competitors who are successful in this examination and who qualify for, and have requested, these points through the State Personnel Board. Due to changes in the law, effective January 1, 1996. Veterans who have achieved permanent civil service status are not eligible to receive veterans' preference credits.

CONTACT INFORMATION

If you have any questions concerning this announcement, please contact:

State Personnel Board

801 Capitol Mall

P.O. Box 944201, Sacramento, CA 94244-2010

(866) 844-8671

TTY (916) 654-6336

GENERAL INFORMATION

If you meet the requirements stated on this examination bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described on this bulletin will be rated against a predetermined job-related rating, and all candidates who pass will be ranked according to their scores.

Franchise Tax Board reserves the right to revise the examination plan to better meet the needs of the service, if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service law and rules and all competitors will be notified.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

Veterans' Preference Points: California Law (Government Code 18971-18978) allows the granting of Veterans' Preference Points in open entrance and open, non-promotional entrance examinations. Veterans' Preference Points will be added to the final score of all competitors who are successful in these types of examinations, and who qualify for, and have requested by mail, these points. **In open (only)** entrance examinations, Veterans' Preference Points are granted as follows: 10 points for veterans, widows and widowers of veterans, and spouses of 100% disabled veterans (5 points for widows, widowers, and spouses if the veteran was in the National Guard); and 15 points for disabled veterans. **In open, non-promotional** entrance examinations, Veterans' Preference Points are granted as follows: 10 points for veterans, and 15 points for disabled veterans. Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference Points. "Permanent State civil service status" means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned, or were dismissed from State civil service are not eligible to receive Veterans' Preference Points. Veteran status is verified by the State Personnel Board (SPB). Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application (Std. Form 1093), which is available at www.spb.ca.gov or from the State Personnel Board, 801 Capitol Mall, Sacramento, CA 95814, and the Department of Veterans Affairs.

TAKING THE EXAM

When you click the link below, you will be directed to the Training and Experience Evaluation. At the end of the Training and Experience Evaluation, once you click "Score My Exam," it will be instantly scored.

[Click here to go to the Internet Exam for Tax Technician](#)